

☒ **REPORT OF LOBBYIST EMPLOYER**

(Government Code Section 86116)

1/6

or

☐ **REPORT OF LOBBYING COALITION**

(2 Cal. Code of Regs. Section 18616.4)

FORM 635
1993

IMPORTANT: Lobbying Coalitions must attach a completed Form 635-C to this Report.

REPORT COVERS PERIOD FROM 10/01/2009 **THROUGH** 12/31/2009

CUMULATIVE PERIOD BEGINNING 01/01/2009

TYPE OR PRINT IN INK

For information required to be provided to you pursuant to the Information Practices Act of 1977, see [Information Manual on Lobbying Disclosure Provisions of the Political Reform Act](#).

FOR OFFICIAL USE ONLY

A

B

NAME OF FILER:

PROFESSIONAL FIDUCIARY ASSOCIATION OF CALIFORNIA

BUSINESS ADDRESS: (Number and Street)

(City)

(State)

(Zip Code)

TELEPHONE NUMBER:

SACRAMENTO CA 95814

PART I - LEGISLATIVE OR STATE AGENCY ADMINISTRATIVE ACTIONS ACTIVELY LOBBIED DURING THE PERIOD

(See instructions on reverse.)

CA AB 12 CA AB 76 CA AB 82 CA AB 103 CA AB 123 CA AB 152 CA AB 215 CA AB 235 CA AB 276 CA AB 324 CA AB 3 -
29 CA AB 355 CA AB 367 CA AB 392 CA AB 407 CA AB 415 CA AB 416 CA AB 535 CA AB 724 CA AB 730 CA AB 762 -
CA AB 768 CA AB 773 CA AB 885 CA AB 950 CA AB 989 CA AB 1037 CA AB 1038 CA AB 1163 CA AB 1168

☒ If more space is needed, check box and attach continuation sheets.

SUMMARY OF PAYMENTS THIS PERIOD

A. Total Payments to In-House Employee Lobbyists (Part III, Section A, Column 1) \$ 0.00
B. Total Payments to Lobbying Firms (Part III, Section B, Column 4) \$ 7500.00
C. Total Activity Expenses (Part III, Section C) \$ 0.00
D. Total Other Payments to Influence (Part III, Section D) \$ 0.00

GRAND TOTAL (A + B + C + D above) \$ 7500.00

E. Total Payments in Connection with PUC Activities (Part III, Section E) \$ 0.00

F. Campaign Contributions: ☐ Part IV completed and attached ☒ No campaign contributions made this period

VERIFICATION

I have used all reasonable diligence in preparing this Report. I have reviewed the Report and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on (Date)
01/31/2009

At (City and State)
Sacramento, CA

By (Signature of Employer or Responsible Officer)
Jackie Miller

Name of Employer or Responsible Officer (Type or Print)
Jackie Miller

Title
Executive Director

PERIOD COVERED: 10/01/2009 12/31/2009NAME OF FILER: PROFESSIONAL FIDUCIARY ASSOCIATION OF CALIFORNIA**PART II - PARTNERS, OWNERS, AND EMPLOYEES WHOSE "LOBBYIST REPORTS" (FORM 615) ARE ATTACHED TO THIS REPORT** (See instructions on reverse.)

| Name and Title | Name and Title |
|----------------|----------------|
| | |
| | |
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| | |

☐ If more space is needed, check box and attach continuation sheets.
PART III - PAYMENTS MADE IN CONNECTION WITH LOBBYING ACTIVITIES

| A. PAYMENTS TO IN-HOUSE EMPLOYEE LOBBYISTS (See instructions on reverse. Also enter the Amount This Period (Column 1) on Line A of the Summary of Payments section on page 1.) | (1) Amount This Period | (2) Cumulative Total To Date |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------------------------|
| | \$ 0.00 | \$ 0.00 |

| B. PAYMENTS TO LOBBYING FIRMS (Including Individual Contract Lobbyists) | | | | | |
|-------------------------------------------------------------------------|----------------------------|--------------------------------------|--------------------------------------------------------------|-----------------------------|------------------------------------|
| Name and Address of Lobbying Firm/Independent Contractor | (1) Fees & Retainers | (2) Reimbursements of Expenses | (3) Advances or Other Payments (attach explanation) | (4) Total This Period | (5) Cumulative Total to Date |
| Carey Associates Sacramento, CA 95814 | 7500.00 | 0.00 | 0.00 | 7500.00 | 30000.00 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

☐ If more space is needed, check box and attach continuation sheets
TOTAL THIS PERIOD (Column 4)

Also enter the total of Column 4 on Line B of the Summary of Payments section on page 1.

\$ 7500.00

PERIOD COVERED: 10/01/2009 12/31/2009NAME OF FILER: PROFESSIONAL FIDUCIARY ASSOCIATION OF CALIFORNIA**C. ACTIVITY EXPENSES** (See instructions on reverse.)

| Date | Name and Address of Payee | Name and Official Position of Reportable Persons and Amount Benefiting Each | Description of Consideration | Total Amount of Activity |
|------|---------------------------|-----------------------------------------------------------------------------------|---------------------------------|--------------------------------|
| | | | \$ | \$ |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

☐ If more space is needed, check box and attach continuation sheets.

 TOTAL SECTION C (Activity Expenses)
 Also enter the total of Section C on Line C of
 the Summary of Payments section on page 1.

\$ 0.00

D. OTHER PAYMENTS TO INFLUENCE LEGISLATIVE OR ADMINISTRATIVE ACTION
☒ NOTE: State and local government agencies do not complete this section. Check box and complete Attachment Form 640 instead.

1. PAYMENTS TO LOBBYING COALITIONS (NOTE: You must attach a completed Form 630 to this Report.)

\$ 0.00

2. OTHER PAYMENTS

\$ 0.00

 TOTAL SECTION
 D (1 + 2) Also
 enter the total of
 Section D on Line
 D of the Summary
 of Payments
 section on page 1.

\$ 0.00

E. PAYMENTS IN CONNECTION WITH ADMINISTRATIVE TESTIMONY IN RATEMAKING PROCEEDINGS BEFORE THE CALIFORNIA PUBLIC UTILITIES COMMISSION

Also, enter the total of Section E on Line E of the Summary of Payments section on page 1. (See instructions on reverse.)

\$ 0.00

PERIOD COVERED: 10/01/2009 12/31/2009NAME OF FILER: PROFESSIONAL FIDUCIARY ASSOCIATION OF CALIFORNIA

PART IV -- CAMPAIGN CONTRIBUTIONS MADE (Monetary and non-monetary campaign contributions of \$100 or more made to or on behalf of state candidates, elected state officers and any of their controlled committees, or committees supporting such candidates or officers must be reported in A or B below.)

- A. If the contributions made by you during the period covered by this report, or by a committee you sponsor, are contained in a campaign disclosure statement which is on file with the Secretary of State, report the name of the committee and its identification number, if any, below.

Name of Major Donor or Recipient Committee Which
Has Filed A Campaign Disclosure Statement:

Identification Number if
Recipient Committee: _____

- B. Contributions of \$100 or more which have not been reported on a campaign disclosure statement, including contributions made by an organization's sponsored committee, must be itemized below.

| Date | Name of Recipient | I.D. Number if Committee | Amount |
|------|-------------------|-----------------------------|--------|
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |
| | | | \$ |



If more space is needed, check box and attach continuation sheets.

NOTE: Disclosure in this report does not relieve a filer of any obligation to file the campaign disclosure statements required by Gov. Code Section 84200, et seq.

Attachment Form 640

(Attachment to Form 635 or Form 645)

CALIFORNIA
1993 FORM**640**

5/6

PERIOD COVERED: 10/01/2009--12/31/2009NAME OF FILER: PROFESSIONAL FIDUCIARY ASSOCIATION OF CALIFORNIA

For Use By: A state or local government agency that qualifies as a lobbyist employer or a \$5,000 filer. Refer to the instructions on the cover page before completing this attachment.

Other Payments to Influence Legislative or Administrative Action:

| | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| 1. Total payments for overhead expenses related to lobbying activity. <u>Report as a lump sum.</u> | \$ 0.00 |
| 2. Total payments to Lobbying Coalitions. <u>Report as a lump sum.</u> (Form 630 must be attached) | \$ 0.00 |
| 3. Total payments of less than \$250 during the calendar quarter for lobbying activity (excluding overhead). <u>Report as a lump sum.</u> | \$ 0.00 |
| 4. Total payments of more than \$250 during the calendar quarter for lobbying activity (excluding overhead). Such payments must be itemized below. | \$ 0.00 |
| 5. Grand total of "Other Payments to Influence Legislative or Administrative Action." Also enter this total on the appropriate line of the Summary of Payments section on Page 1 of Form 635 or Form 645. | \$ 0.00 |

Itemize below payments of \$250 or more made during the quarter for lobbying activity. Provide the name and address of the payee, the amount paid during the quarter, and the cumulative amount paid to the payee since January 1 of the biennial legislative session covered by the report.

Also itemize dues or similar payments of \$250 or more made to an organization that makes expenditures equal to 10% of its total expenditures or \$15,000 or more in a calendar quarter to influence legislative or administrative action. Provide the organization's name and address, the amount paid to the organization during the quarter, and the cumulative amount paid to the organization since January 1 of the biennial legislative session covered by the report.

| Name & Address of Payee | Amount This Quarter | Cumulative Amount Since January 1 |
|-----------------------------------------|---------------------|-----------------------------------|
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| Subtotal of all payments itemized above | \$ 0.00 | |

☐ If more space is needed, check box and attach continuation sheets.

TEXT ANNOTATION

PAGE 1

Schedule F635

Reference No:

CA AB 215 CA AB 235 CA AB 276 CA AB 324 CA AB 329 CA AB 355 CA AB 367 CA AB 392 CA AB 407 CA AB 415 CA AB -
416 CA AB 535 CA AB 724 CA AB 730 CA AB 762 CA AB 768 CA AB 773 CA AB 885 CA AB 950 CA AB 989 CA AB 1037 -
CA AB 1038 CA AB 1163 CA AB 1168 CA AB 1169 CA AB 1183 CA AB 1458 CA AB 1462 CA AB 1545 CA AJR 6 CA SB 18 -
CA SB 91 CA SB 127 CA SB 274 CA SB 303 CA SB 308 CA SB 311 CA SB 344 CA SB 367 CA SB 377 CA SB 389 CA SB 6 -
38 CA SB 661 CA SCR 28 CA SJR 4. Monitored all Extraordinary Session Budget Bills